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Oilseeds and Products

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Report Highlights:

French oilseed production is expected to decline from 5.67 million MT in 2000 to 5.52 million MT in 2001. France produces mainly rapeseed and sunflowerseed, but consumes principally soybeans and soybean meals, and is therefore a major market for soybean products. The United States was France's leading supplier of soybeans in MY 99/00, with 57 percent of the market, while Brazil was France's leading supplier of soybean meals (36 percent). The EU ban on meat and bone meals from animal feed is likely to increase French imports of soybean meals in 2001.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary	1
Section I: Situation and Outlook	2
Section II: Statistical Tables	3
PS&D Tables	3
Oilseeds	3
Meals	7
Oils	12
Trade Matrices	19
Oilseeds	19
Meals	23
Oils	28
Section III: Supply, Demand, Policy and Marketing	35
Production	35
Oilseeds	35
Meals	36
Consumption	36
Oilseeds	36
Meals	37
Trade	38
Policy	38
Agenda 2000	38
Rural Development Regulation: Sunflowerseed Subsidy	39
Meat and Bone Meal Ban in Animal Feed	39
French Program on non-GMO Soybeans	39
European Oilseed Alliance	40

Executive Summary

French oilseed production is expected to decline from 5.67 million MT in 2000 to 5.52 million MT in 2001. France produces mainly rapeseed and sunflowerseed, but consumes principally soybeans and soybean meals, and is therefore a major market for soybean products. The United States was France's leading supplier of soybeans in MY 99/00, with 57 percent of the market, while Brazil was France's leading supplier of soybean meals (36 percent). The EU ban on meat and bone meals from animal feed is likely to increase French imports of soybean meals in 2001.

Section I: Situation and Outlook

France is the leading producer of oilseeds in the EU, ahead of Germany, Italy and Spain. In 2000, 42 percent of total European oilseeds were produced in France, and 44 percent of European non-food oilseeds were grown in France. In 2000, French oilseed production totaled 5.67 million MT, and the forecast is for a decline to 5.52 million MT in 2001, including 3.3 million MT of rapeseed, 1.87 million MT of sunflowerseed, and 310,000 MT of soybeans. Up-to-date statistical, economic and political information on the French oilseed sector is available on the website of French oilseed growers at <http://www.prolea.com>

France is a major market for soybeans and soybean meal. In MY 99/00, the U.S. gained back its traditional position of leading supplier of soybeans to France, with 57 percent of the market. In MY 98/99, the U.S. had lost a significant market share to Brazil, which lead the market with 47 percent market share, as a result of the high dollar rate and French concerns with GMOs. On the soybean meal side, Brazil remained France's leading supplier in MY 99/00, with 3 million MT, ahead of Argentina. U.S. soybean meal is marginal on the French market, due to the price premium of North American products over South American products.

The ban on Meat and Bone Meals (MBM) for animal feeds in France and the EU is expected to increase the French and EU demand for soybeans and soybean meal in 2001. France, which the EU's leading producer of compound feed, used to consume 350,000 MT of MBM per year, which will need to be replaced by protein meals equivalent to 440,000 MT of soybean meal (5 percent of annual French imports of soybean meal). French oilseed growers pressure the GOF and European authorities to set up incentives to increase the French and European oilseed and protein seed production, but, to date, the European Commission has not responded in favor of such a proposal.

Section II: Statistical Tables

PS&D Tables

Oilseeds

PSD Table						
Country	France					
Commodity	Oilseed, Rapeseed				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Planted	1370	1343	1200	1235	0	1113
Area Harvested	1355	1343	1200	1235	0	1113
Beginning Stocks	110	110	130	85	35	66
Production	4400	4454	3600	3590	0	3340
MY Imports	47	46	100	28	0	30
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	30	19	33	15	0	15
TOTAL SUPPLY	4557	4610	3830	3703	35	3436
MY Exports	2575	2767	2200	1895	0	1750
MY Exp. to the EC	1575	1641	1700	1560	0	1450
Crush Dom. Consumption	1500	1403	1350	1275	0	1200
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	352	355	245	467	0	420
TOTAL Dom. Consumption	1852	1758	1595	1742	0	1620
Ending Stocks	130	85	35	66	0	66
TOTAL DISTRIBUTION	4557	4610	3830	3703	0	3436
Calendar Year Imports	45	25	100	30	0	30
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	2650	2241	2200	1900	0	1800
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Oilseed, Sunflowerseed				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Planted	830	817	750	737	0	750
Area Harvested	830	817	750	737	0	750
Beginning Stocks	161	202	252	342	177	369
Production	1910	1919	1850	1873	0	1875
MY Imports	100	127	120	170	0	170
MY Imp. from U.S.	15	13	15	15	0	15
MY Imp. from the EC	5	4	5	5	0	5
TOTAL SUPPLY	2171	2248	2222	2385	177	2414
MY Exports	475	453	525	480	0	500
MY Exp. to the EC	425	441	460	460	0	480
Crush Dom. Consumption	1380	1241	1450	1325	0	1350
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	64	212	70	211	0	220
TOTAL Dom. Consumption	1444	1453	1520	1536	0	1570
Ending Stocks	252	342	177	369	0	344
TOTAL DISTRIBUTION	2171	2248	2222	2385	0	2414
Calendar Year Imports	93	86	185	100	0	130
Calendar Yr Imp. U.S.	15	15	15	15	0	15
Calendar Year Exports	526	509	525	500	0	480
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Oilseed, Soybean				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/1999		10/2000		10/2001
Area Planted	100	102	85	79	0	120
Area Harvested	100	102	85	79	0	120
Beginning Stocks	16	16	6	36	1	36
Production	260	267	220	208	0	310
MY Imports	430	467	550	550	0	500
MY Imp. from U.S.	200	265	220	280	0	250
MY Imp. from the EC	50	51	50	60	0	50
TOTAL SUPPLY	706	750	776	794	1	846
MY Exports	26	11	25	6	0	20
MY Exp. to the EC	26	11	25	6	0	20
Crush Dom. Consumption	425	329	525	355	0	380
Food Use Dom. Consump.	30	30	25	30	0	30
Feed,Seed,Waste Dm.Cn.	219	344	200	367	0	370
TOTAL Dom. Consumption	674	703	750	752	0	780
Ending Stocks	6	36	1	36	0	46
TOTAL DISTRIBUTION	706	750	776	794	0	846
Calendar Year Imports	450	439	550	500	0	500
Calendar Yr Imp. U.S.	200	194	220	200	0	250
Calendar Year Exports	26	8	25	15	0	20
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Oilseed, Peanut				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/1999		10/2000		10/2001
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Beginning Stocks	5	0	5	0	5	0
Production	0	0	0	0	0	0
MY Imports	65	28	65	30	0	30
My Imp. from U.S.	10	9	10	10	0	10
MY Imp. from the EC	15	5	5	5	0	5
TOTAL SUPPLY	70	28	70	30	5	30
MY Exports	3	2	2	2	0	2
MY Exp. to the EC	3	2	2	2	0	2
Crush Dom. Consumption	12	3	8	3	0	3
Food Use Dom. Consump.	50	23	55	25	0	25
Feed,Seed,Waste Dm.Cn.	0	0	0	0	0	0
TOTAL Dom. Consumption	62	26	63	28	0	28
Ending Stocks	5	0	5	0	0	0
TOTAL DISTRIBUTION	70	28	70	30	0	30
Calendar Year Imports	65	25	65	30	0	30
Calendar Yr Imp. U.S.	10	8	10	8	0	8
Calendar Year Exports	2	2	2	2	0	2
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

Meals

PSD Table						
Country	France					
Commodity	Meal, Rapeseed				(1000 MT)(PERCENT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Crush	1500	1403	1350	1275	0	1200
Extr. Rate, 999.9999	0.563333	0.529579	0.562963	0.588235	ERR	0.566667
Beginning Stocks	43	23	43	34	33	34
Production	845	743	760	750	0	680
MY Imports	285	395	330	380	0	420
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	270	338	310	325	0	360
TOTAL SUPPLY	1173	1161	1133	1164	33	1134
MY Exports	70	65	65	50	0	50
MY Exp. to the EC	65	60	60	45	0	45
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	1060	1062	1035	1080	0	1060
TOTAL Dom. Consumption	1060	1062	1035	1080	0	1060
Ending Stocks	43	34	33	34	0	24
TOTAL DISTRIBUTION	1173	1161	1133	1164	0	1134
Calendar Year Imports	260	363	335	350	0	400
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	70	42	65	50	0	50
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Meal, Sunflowerseed				(1000 MT)(PERCENT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Crush	1380	1241	1450	1325	0	1350
Extr. Rate, 999.9999	0.525362	0.543916	0.524138	0.528302	ERR	0.533333
Beginning Stocks	36	26	33	33	23	13
Production	725	675	760	700	0	720
MY Imports	400	462	270	400	0	400
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	140	111	120	150	0	150
TOTAL SUPPLY	1161	1163	1063	1133	23	1133
MY Exports	120	123	100	120	0	120
MY Exp. to the EC	110	110	100	110	0	110
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	1008	1007	940	1000	0	1000
TOTAL Dom. Consumption	1008	1007	940	1000	0	1000
Ending Stocks	33	33	23	13	0	13
TOTAL DISTRIBUTION	1161	1163	1063	1133	0	1133
Calendar Year Imports	366	366	250	400	0	400
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	120	130	120	120	0	120
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Meal, Soybean				(1000 MT)(PERCENT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/1999		10/2000		10/2001
Crush	425	329	525	355	0	380
Extr. Rate, 999.9999	0.795294	0.890578	0.79619	0.816901	ERR	0.815789
Beginning Stocks	4	4	4	7	4	12
Production	338	293	418	290	0	310
MY Imports	4070	4171	4287	4175	0	4170
MY Imp. from U.S.	3	8	18	3	0	5
MY Imp. from the EC	585	640	575	640	0	640
TOTAL SUPPLY	4412	4468	4709	4472	4	4492
MY Exports	35	39	35	40	0	40
MY Exp. to the EC	25	15	25	15	0	15
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	4373	4422	4670	4420	0	4440
TOTAL Dom. Consumption	4373	4422	4670	4420	0	4440
Ending Stocks	4	7	4	12	0	12
TOTAL DISTRIBUTION	4412	4468	4709	4472	0	4492
Calendar Year Imports	4100	4218	4290	4170	0	4170
Calendar Yr Imp. U.S.	3	8	18	5	0	5
Calendar Year Exports	35	50	35	40	0	40
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Meal, Peanut				(1000 MT)(PERCENT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/1999		10/2000		10/2001
Crush	12	3	8	3	0	3
Extr. Rate, 999.9999	0.5	0	0.5	0.666667	ERR	0.666667
Beginning Stocks	3	5	2	6	0	2
Production	6	0	4	2	0	2
MY Imports	130	126	130	125	0	130
MY Imp. from U.S.	6	0	0	0	0	0
MY Imp. from the EC	10	12	10	10	0	10
TOTAL SUPPLY	139	131	136	133	0	134
MY Exports	1	0	1	0	0	1
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	136	125	135	131	0	131
TOTAL Dom. Consumption	136	125	135	131	0	131
Ending Stocks	2	6	0	2	0	2
TOTAL DISTRIBUTION	139	131	136	133	0	134
Calendar Year Imports	130	126	130	130	0	130
Calendar Yr Imp. U.S.	3	0	3	0	0	0
Calendar Year Exports	2	0	1	0	0	1
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Meal, Fish				(1000 MT)(PERCENT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/2000		10/2001		10/2002
Catch For Reduction	0	0	0	0	0	0
Extr. Rate, 999.9999	ERR	ERR	ERR	ERR	ERR	ERR
Beginning Stocks	0	0	0	0	0	0
Production	20	20	20	20	0	20
MY Imports	133	95	140	95	0	95
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	15	9	15	10	0	10
TOTAL SUPPLY	153	115	160	115	0	115
MY Exports	35	17	30	17	0	17
MY Exp. to the EC	6	13	6	13	0	13
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	118	98	130	98	0	98
TOTAL Dom. Consumption	118	98	130	98	0	98
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	153	115	160	115	0	115
Calendar Year Imports	133	90	140	95	0	95
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	35	15	30	17	0	17
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

Oils

PSD Table						
Country	France					
Commodity	Oil, Rapeseed				(1000 MT)(PERCENT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Crush	1500	1403	1350	1275	0	1200
Extr. Rate, 999.9999	0.416667	0.4134	0.414815	0.415686	ERR	0.416667
Beginning Stocks	10	10	52	23	32	23
Production	625	580	560	530	0	500
MY Imports	145	153	150	160	0	180
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	90	151	95	140	0	150
TOTAL SUPPLY	780	743	762	713	32	703
MY Exports	245	270	205	240	0	220
MY Exp. to the EC	90	169	90	150	0	120
Industrial Dom. Consum	248	212	240	210	0	215
Food Use Dom. Consump.	235	238	285	240	0	245
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	483	450	525	450	0	460
Ending Stocks	52	23	32	23	0	23
TOTAL DISTRIBUTION	780	743	762	713	0	703
Calendar Year Imports	145	183	150	150	0	170
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	245	241	205	250	0	230
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Oil, Sunflowerseed				(1000 MT)(PERCENT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		08/1999		08/2000		08/2001
Crush	1380	1241	1450	1325	0	1350
Extr. Rate, 999.9999	0.418841	0.419017	0.41931	0.415094	ERR	0.414815
Beginning Stocks	34	78	33	87	33	87
Production	578	520	608	550	0	560
MY Imports	110	148	95	140	0	130
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	110	115	95	100	0	100
TOTAL SUPPLY	722	746	736	777	33	777
MY Exports	273	253	265	270	0	280
MY Exp. to the EC	180	172	175	190	0	200
Industrial Dom. Consum	30	16	40	20	0	15
Food Use Dom. Consump.	386	390	390	400	0	395
Feed Waste Dom. Consum	0	0	8	0	0	0
TOTAL Dom. Consumption	416	406	438	420	0	410
Ending Stocks	33	87	33	87	0	87
TOTAL DISTRIBUTION	722	746	736	777	0	777
Calendar Year Imports	131	131	95	140	0	130
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	277	276	265	260	0	280
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Oil, Soybean				(1000 MT)(PERCENT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/1999		10/2000		10/2001
Crush	425	329	525	355	0	380
Extr. Rate, 999.9999	0.181176	0.221884	0.180952	0.180282	ERR	0.178947
Beginning Stocks	1	1	1	9	2	9
Production	77	73	95	64	0	68
MY Imports	35	59	35	65	0	60
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	35	36	35	45	0	35
TOTAL SUPPLY	113	133	131	138	2	137
MY Exports	50	43	50	40	0	45
MY Exp. to the EC	4	1	4	1	0	4
Industrial Dom. Consum	40	45	45	50	0	47
Food Use Dom. Consump.	22	36	34	39	0	36
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	62	81	79	89	0	83
Ending Stocks	1	9	2	9	0	9
TOTAL DISTRIBUTION	113	133	131	138	0	137
Calendar Year Imports	35	46	35	60	0	60
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	50	48	50	40	0	45
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Oil, Peanut				(1000 MT)(PERCENT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/1999		10/2000		10/2001
Crush	12	3	8	3	0	3
Extr. Rate, 999.9999	0.666667	0.666667	0.625	0.666667	ERR	0.666667
Beginning Stocks	6	6	6	6	6	6
Production	8	2	5	2	0	2
MY Imports	70	93	75	90	0	90
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	15	19	15	20	0	20
TOTAL SUPPLY	84	101	86	98	6	98
MY Exports	20	23	20	20	0	20
MY Exp. to the EC	15	17	15	15	0	15
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	58	72	60	72	0	72
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	58	72	60	72	0	72
Ending Stocks	6	6	6	6	0	6
TOTAL DISTRIBUTION	84	101	86	98	0	98
Calendar Year Imports	70	70	75	90	0	90
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	20	20	20	20	0	20
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Oil, Fish				(1000 MT)(PERCENT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/1999		10/2000		10/2001
Catch For Reduction	0	0	0	0	0	0
Extr. Rate, 999.9999	ERR	ERR	ERR	ERR	ERR	ERR
Beginning Stocks	0	0	0	0	0	0
Production	0	3	0	3	0	3
MY Imports	0	41	0	40	0	40
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	24	0	25	0	25
TOTAL SUPPLY	0	44	0	43	0	43
MY Exports	0	18	0	20	0	20
MY Exp. to the EC	0	18	0	20	0	20
Industrial Dom. Consum	0	5	0	5	0	5
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	0	21	0	18	0	18
TOTAL Dom. Consumption	0	26	0	23	0	23
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	44	0	43	0	43
Calendar Year Imports	0	40	0	40	0	40
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	20	0	20	0	20
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Oil, Olive				(1000 HA)(1000 TREES)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		11/1999		11/2000		11/2001
Area Planted	13	13	13	13	0	13
Area Harvested	13	13	13	13	0	13
Trees	3000	3000	0	3000	0	3000
Beginning Stocks	7	7	6	11	6	8
Production	3	3	3	4	0	4
MY Imports	78	85	78	80	0	80
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	76	76	76	70	0	70
TOTAL SUPPLY	88	95	87	95	6	92
MY Exports	6	5	5	6	0	6
MY Exp. to the EC	4	4	4	4	0	4
Industrial Dom. Consum	0	1	0	1	0	1
Food Use Dom. Consump.	76	78	76	80	0	80
Feed Waste Consumption	0	0	0	0	0	0
TOTAL Dom. Consumption	76	79	76	81	0	81
Ending Stocks	6	11	6	8	0	5
TOTAL DISTRIBUTION	88	95	87	95	0	92
Calendar Year Imports	77	85	77	80	0	80
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	6	5	5	5	0	5
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

PSD Table						
Country	France					
Commodity	Oil, Palm				(1000 HA)(1000 TREES)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/1999		10/2000		10/2001
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Trees	0	0	0	0	0	0
Beginning Stocks	0	0	0	0	0	0
Production	0	0	0	0	0	0
MY Imports	115	133	135	130	0	130
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	90	116	90	115	0	115
TOTAL SUPPLY	115	133	135	130	0	130
MY Exports	2	2	2	2	0	2
MY Exp. to the EC	2	2	2	2	0	2
Industrial Dom. Consum	38	46	38	45	0	45
Food Use Dom. Consump.	70	85	80	83	0	83
Feed Waste Consumption	5	0	15	0	0	0
TOTAL Dom. Consumption	113	131	133	128	0	128
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	115	133	135	130	0	130
Calendar Year Imports	115	124	125	120	0	120
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	2	2	2	2	0	2
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Sources: ONIOL, SCEES, French Customs

Trade Matrices

Oilseeds

Export Trade Matrix			
Country	France		
Commodity	Oilseed, Rapeseed		
Time period	July-June	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
Germany	782150		n/a
Belgium	587647		n/a
China	505893		n/a
Pakistan	242132		n/a
Netherlands	196867		n/a
Bangladesh	141488		n/a
Mexico	56813		n/a
UK	52050		n/a
India	44125		n/a
Japan	23100		n/a
Total for Others	2632265		0
Others not Listed	134814		n/a
Grand Total	2767079		0

Time period	July-June	Units:	MT
Imports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
Belgium	9346		n/a
Germany	7043		n/a
Poland	5333		n/a
Ukraine	5262		n/a
Romania	3784		n/a
Croatia	3328		n/a
Lituania	2340		n/a
			n/a
			n/a
			n/a
Total for Others	36436		0
Others not Listed	10030		n/a
Grand Total	46466		0

Source: French Customs

Import Trade Matrix			
Country	France		
Commodity	Oilseed, Rapeseed		

Export Trade Matrix			
Country	France		
Commodity	Oilseed, Sunflowerseed		
Time period	July-June	Units:	MT
Exports for:	1999		2000
U.S.	2	U.S.	n/a
Others		Others	
Spain	183977		n/a
Belgium	132847		n/a
Germany	71488		n/a
Netherlands	45616		n/a
Morocco	6600		n/a
Switzerland	4707		n/a
Portugal	3764		n/a
UK	3035		n/a
			n/a
			n/a
Total for Others	452034		0
Others not Listed	597		n/a
Grand Total	452633		0

Source: French Customs

Commodity	Oilseed, Sunflowerseed		
Time period	July-June	Units:	MT
Imports for:	1999		2000
U.S.	13067	U.S.	n/a
Others		Others	
Romania	63123		n/a
Bulgaria	20775		n/a
Russia	12681		n/a
Ukraine	11700		n/a
Germany	1499		n/a
Spain	951		n/a
Italy	881		n/a
Argentina	716		n/a
Belgium	452		n/a
Hungary	264		n/a
Total for Others	113042		0
Others not Listed	1020		n/a
Grand Total	127129		0

Import Trade Matrix			
Country	France		

Export Trade Matrix			
Country	France		
Commodity	Oilseed, Soybean		
Time period	Oct-Sept	Units:	MT
Exports for:	1999		2000
U.S.	13	U.S.	n/a
Others		Others	
Spain	10172		n/a
Germany	701		n/a
Switzerland	271		n/a
Italy	121		n/a
Portugal	103		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	11368		0
Others not Listed	162		n/a
Grand Total	11543		0

Time period	Oct-Sept	Units:	MT
Imports for:	1999		2000
U.S.	265298	U.S.	n/a
Others		Others	
Brazil	103222		n/a
Netherlands	25741		n/a
Paraguay	22015		n/a
Canada	19089		n/a
Belgium	16259		n/a
Spain	6812		n/a
Argentina	2538		n/a
China	2051		n/a
Italy	1841		n/a
			n/a
Total for Others	199568		0
Others not Listed	919		n/a
Grand Total	465785		0

Source: French Customs

Import Trade Matrix			
Country	France		
Commodity	Oilseed, Soybean		

Export Trade Matrix			
Country	France		
Commodity	Oilseed, Peanut		
Time period	Oct-Sept	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
Italy	1424		n/a
Algeria	227		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	1651		0
Others not Listed	95		n/a
Grand Total	1746		0

Commodity	Oilseed, Peanut		
Time period	Oct-Sept	Units:	MT
Imports for:	1999		2000
U.S.	8710	U.S.	n/a
Others		Others	
Argentina	8984		n/a
China	6161		n/a
Netherlands	2095		n/a
Germany	460		n/a
Spain	355		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	18055		0
Others not Listed	753		n/a
Grand Total	27518		0

Source: French Customs

Import Trade Matrix			
Country	France		

Meals

Export Trade Matrix			
Country	France		
Commodity	Meal, Rapeseed		
Time period	July-June	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
UK	33212		n/a
Spain	22702		n/a
Ireland	4435		n/a
Switzerland	3450		n/a
Israel	3133		n/a
Portugal	2950		n/a
Netherlands	1321		n/a
Belgium	517		n/a
			n/a
			n/a
Total for Others	71720		0
Others not Listed	342		n/a
Grand Total	72062		0

Import Trade Matrix			
Country	France		
Commodity	Meal, Rapeseed		
Time period	July-June	Units:	MT
Imports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
Belgium	141323		n/a
UK	93614		n/a
Germany	87247		n/a
China	52233		n/a
Netherlands	12870		n/a
Poland	4854		n/a
Spain	1756		n/a
Brazil	1373		n/a
			n/a
			n/a
Total for Others	395270		0
Others not Listed	1414		n/a
Grand Total	396684		0

Source: French Customs

Export Trade Matrix			
Country	France		
Commodity	Meal, Sunflowerseed		
Time period	July-June	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
UK	69518		n/a
Spain	26327		n/a
Ireland	15683		n/a
Portugal	4158		n/a
Morocco	3176		n/a
Germany	2515		n/a
Netherlands	1103		n/a
			n/a
			n/a
			n/a
Total for Others	122480		0
Others not Listed	283		n/a
Grand Total	122763		0

Source: French Customs

Commodity	Meal, Sunflowerseed		
Time period	July-June	Units:	MT
Imports for:	1999		2000
U.S.	138	U.S.	n/a
Others		Others	
Argentina	350247		n/a
Belgium	67681		n/a
Netherlands	19367		n/a
Germany	12476		n/a
Spain	9222		n/a
Italy	1669		n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	460662		0
Others not Listed	1227		n/a
Grand Total	462027		0

Import Trade Matrix			
Country	France		

Export Trade Matrix			
Country	France		
Commodity	Meal, Soybean		
Time period	Oct-Sept	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
Switzerland	27960		n/a
Belgium	4074		n/a
Netherlands	2376		n/a
Italy	1597		n/a
Spain	1404		n/a
Germany	1302		n/a
UK	341		n/a
Cuba	231		n/a
Denmark	222		n/a
			n/a
Total for Others	39507		0
Others not Listed	29		n/a
Grand Total	39536		0

Source: French Customs

Commodity	Meal, Soybean		
Time period	Oct-Sept	Units:	MT
Imports for:	1999		2000
U.S.	8431	U.S.	n/a
Others		Others	
Brazil	3014346		n/a
Argentina	476102		n/a
Belgium	374954		n/a
Netherlands	91454		n/a
Germany	86454		n/a
Spain	77286		n/a
India	19986		n/a
Trinidad	9997		n/a
UK	5848		n/a
Surinam	1180		n/a
Total for Others	4157607		0
Others not Listed	4171390		n/a
Grand Total	8337428		0

Import Trade Matrix			
Country	France		

Export Trade Matrix			
Country	France		
Commodity	Meal, Peanut		
Time period	Oct-Sept	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
Belgium	365		n/a
Italy	14		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	379		0
Others not Listed	69		n/a
Grand Total	448		0

Source: French Customs

Commodity	Meal, Peanut		
Time period	Oct-Sept	Units:	MT
Imports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
Senegal	87480		n/a
Sudan	20466		n/a
Netherlands	4235		n/a
Belgium	4075		n/a
Argentina	3580		n/a
Spain	2519		n/a
Togo	2293		n/a
Sweden	796		n/a
			n/a
			n/a
Total for Others	125444		0
Others not Listed	214		n/a
Grand Total	125658		0

Import Trade Matrix			
Country	France		

Export Trade Matrix			
Country	France		
Commodity	Meal, Fish		
Time period	Oct-Sept	Units:	MT
Exports for:	1999		2000
U.S.	174	U.S.	n/a
Others		Others	
Netherlands	7097		n/a
Greece	1880		n/a
Italy	1567		n/a
Spain	1024		n/a
UK	777		n/a
India	564		n/a
Belgium	479		n/a
Switzerland	394		n/a
Germany	373		n/a
Taiwan	350		n/a
Total for Others	14505		0
Others not Listed	1842		n/a
Grand Total	16521		0

Import Trade Matrix			
Country	France		
Commodity	Meal, Fish		
Time period	Oct-Sept	Units:	MT
Imports for:	1999		2000
U.S.	12	U.S.	n/a
Others		Others	
Peru	52340		n/a
Norway	12648		n/a
Iceland	10026		n/a
Chile	9160		n/a
Denmark	4148		n/a
Netherlands	1941		n/a
Spain	1526		n/a
Madagascar	544		n/a
Belgium	439		n/a
Ivory Coast	196		n/a
Total for Others	92968		0
Others not Listed	2088		n/a
Grand Total	95068		0

Source: French Customs

Oils

Export Trade Matrix			
Country	France		
Commodity	Oil, Rapeseed		
Time period	July-June	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
UK	73955		n/a
Netherlands	36925		n/a
Italy	34721		n/a
India	26500		n/a
Turkey	26118		n/a
Tunisia	18071		n/a
Algeria	14197		n/a
Spain	10703		n/a
Benin	8476		n/a
Morocco	3000		n/a
Total for Others	252666		0
Others not Listed	17794		n/a
Grand Total	270460		0

Import Trade Matrix			
Country	France		
Commodity	Oil, Rapeseed		
Time period	July-June	Units:	MT
Imports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
Germany	67359		n/a
Belgium	50528		n/a
Netherlands	20100		n/a
UK	9040		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	147027		0
Others not Listed	5801		n/a
Grand Total	152828		0

Source: French Customs

Export Trade Matrix			
Country	France		
Commodity	Oil, Sunflowerseed		
Time period	July-June	Units:	MT
Exports for:	1999		2000
U.S.	1	U.S.	n/a
Others		Others	
UK	70630		n/a
Algeria	32540		n/a
Belgium	29013		n/a
Netherlands	24030		n/a
Italy	15955		n/a
Spain	13550		n/a
Cuba	13400		n/a
Morocco	9120		n/a
Greece	7710		n/a
Turkey	6483		n/a
Total for Others	222431		0
Others not Listed	30447		n/a
Grand Total	252879		0

Source: French Customs

Commodity	Oil, Sunflowerseed		
Time period	July-June	Units:	MT
Imports for:	1999		2000
U.S.	14	U.S.	n/a
Others		Others	
Belgium	93011		n/a
Argentina	32789		n/a
Netherlands	11249		n/a
Germany	4651		n/a
Spain	3780		n/a
Italy	1664		n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	147144		0
Others not Listed	1279		n/a
Grand Total	148437		0

Import Trade Matrix			
Country	France		

Export Trade Matrix			
Country	France		
Commodity	Oil, Soybean		
Time period	Oct/Sept	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
Morocco	12740		n/a
Senegal	9052		n/a
Turkey	7500		n/a
Lebanon	3689		n/a
Tunisia	3150		n/a
Russia	1561		n/a
Belgium	643		n/a
			n/a
			n/a
			n/a
Total for Others	38335		0
Others not Listed	4806		n/a
Grand Total	43141		0

Commodity	Oil, Soybean		
Time period	Oct/Sept	Units:	MT
Imports for:	1999		2000
U.S.	34	U.S.	n/a
Others		Others	
Belgium	15909		n/a
Netherlands	15197		n/a
Germany	3900		n/a
Mali	292		n/a
UK	274		n/a
Italy	260		n/a
Denmark	232		n/a
Spain	152		n/a
			n/a
			n/a
Total for Others	36216		0
Others not Listed	369		n/a
Grand Total	36619		0

Source: French Customs

Import Trade Matrix			
Country	France		

Export Trade Matrix			
Country	France		
Commodity	Oil, Peanut		
Time period	Oct-Sept	Units:	MT
Exports for:	1999		2000
U.S.	4	U.S.	n/a
Others		Others	
Belgium	8649		n/a
Tunisia	3240		n/a
UK	2083		n/a
Italy	1759		n/a
Germany	1726		n/a
Netherlands	1175		n/a
Polynesia	880		n/a
Portugal	827		n/a
Switzerland	718		n/a
Spain	428		n/a
Total for Others	21485		0
Others not Listed	1117		n/a
Grand Total	22606		0

Import Trade Matrix			
Country	France		
Commodity	Oil, Peanut		
Time period	Oct-Sept	Units:	MT
Imports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
Senegal	58435		n/a
Belgium	17691		n/a
Argentina	13837		n/a
Sudan	1582		n/a
Netherlands	893		n/a
Italy	132		n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	92570		0
Others not Listed	654		n/a
Grand Total	93224		0

Source: French Customs

Export Trade Matrix			
Country	France		
Commodity	Oil, Fish		
Time period	Oct-Sept	Units:	MT
Exports for:	1999		2000
U.S.	62	U.S.	n/a
Others		Others	
Italy	8571		n/a
Germany	4278		n/a
Spain	1455		n/a
UK	1412		n/a
Greece	957		n/a
Netherlands	542		n/a
Belgium	443		n/a
Switzerland	189		n/a
			n/a
			n/a
Total for Others	17847		0
Others not Listed	399		n/a
Grand Total	18308		0

Import Trade Matrix			
Country	France		
Commodity	Oil, Fish		
Time period	Oct-Sept	Units:	MT
Imports for:	1999		2000
U.S.	11	U.S.	n/a
Others		Others	
Denmark	20512		n/a
Norway	6072		n/a
Iceland	4756		n/a
Peru	4595		n/a
Morocco	1712		n/a
Spain	1514		n/a
Germany	925		n/a
Netherlands	452		n/a
Portugal	380		n/a
UK	208		n/a
Total for Others	41126		0
Others not Listed	41		n/a
Grand Total	41178		0

Source: French Customs

Export Trade Matrix			
Country	France		
Commodity	Oil, Olive		
Time period	Nov-Oct	Units:	MT
Exports for:	1999		2000
U.S.	801	U.S.	n/a
Others		Others	
Belgium	894		n/a
Spain	764		n/a
UK	444		n/a
Italy	297		n/a
Germany	264		n/a
Switzerland	126		n/a
Denmark	93		n/a
			n/a
			n/a
			n/a
Total for Others	2882		0
Others not Listed	1232		n/a
Grand Total	4915		0

Import Trade Matrix			
Country	France		
Commodity	Oil, Olive		
Time period	Nov-Oct	Units:	MT
Imports for:	1999		2000
U.S.	0	U.S.	n/a
Others		Others	
Spain	53035		n/a
Italy	30273		n/a
Portugal	856		n/a
Greece	429		n/a
Belgium	339		n/a
Netherlands	271		n/a
Germany	201		n/a
			n/a
			n/a
			n/a
Total for Others	85404		0
Others not Listed	95		n/a
Grand Total	85499		0

Source: French Customs

Export Trade Matrix			
Country	France		
Commodity	Oil, Palm		
Time period	Oct-Sept	Units:	MT
Exports for:	1999		2000
U.S.	5	U.S.	n/a
Others		Others	
Germany	685		n/a
UK	398		n/a
Netherlands	245		n/a
Italy	83		n/a
Spain	79		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	1490		0
Others not Listed	271		n/a
Grand Total	1766		0

Import Trade Matrix			
Country	France		
Commodity	Oil, Palm		
Time period	Oct-Sept	Units:	MT
Imports for:	1999		2000
U.S.	1	U.S.	n/a
Others		Others	
Netherlands	63372		n/a
Belgium	24114		n/a
Italy	10824		n/a
Indonesia	10333		n/a
Spain	8460		n/a
Malaysia	4752		n/a
Germany	3887		n/a
UK	3626		n/a
Denmark	1584		n/a
			n/a
Total for Others	130952		0
Others not Listed	1754		n/a
Grand Total	132707		0

Source: French Customs

Section III: Supply, Demand, Policy and Marketing

Production

Oilseeds

The total area planted to oilseeds in France is expected to decrease by 3 percent from 2.05 million ha in 2000 to 1.98 million ha in 2001, mainly due to reduced rapeseed acreage, as a result of reduced payments to oilseed growers set by the reformed EU policy, aiming at adjusting oilseed payments to grain payments. A lot of uncertainty on the sunflower seed acreage because of the adverse weather conditions observed in April, when sun seeds are usually sown. Floodings and rains delayed sowings significantly. Although minor compared to sunflower seed and rapeseed plantings, soybean acreage is expected to increase in 2001/02 as a result of the GOF incentive to grow specialty, non-GMO soybeans called "Soja de Pays."

Rapeseed, sunflower seed and soybean acreage and production are shown below for 1998/99, 1999/00 and 2000/01:

		1999/00		2000/01		2001/02 (forecast)	
		Area (1,000 ha)	Production (1,000 MT)	Area (1,000 ha)	Production (1,000 MT)	Area (1,000 ha)	Production (1,000 MT)
Rapeseed	Industrial	318	1,004	308	889	280	840
	Food/Feed	1,025	3,450	927	2,701	832	2,500
	Total	1,343	4,454	1,235	3,590	1,112	3,340
Sunflower seeds	Industrial	76	166	64	126	64	126
	Food/Feed	741	1,753	673	1,750	686	1,749
	Total	817	1,919	737	1,876	750	1,875
Soybeans	Food/Feed	102	267	79	208	120	310
Total Oilseeds	Industrial	394	1,170	372	1,015	344	966
	Food/Feed	1,868	5,470	1,679	4,659	1,638	4,559
	Total	2,262	6,640	2,051	5,674	1,982	5,525

The area planted to oilseeds for food and feed use has exceeded the French maximum guaranteed area of 1,557,000 ha set by the EU since 1999/00.

Prices:

In MY 2000/01, oil prices declined due to growing stocks of oils in Europe, while meal prices remained firm, as a result of the high world demand. Oilseed prices resulted from these two contrasted trends and decreased. However, the decline in rapeseed prices was limited by the firm prices for industrial rapeseed.

Industrial rapeseed, mainly used to process Diester (rapeseed methyl ester used as a biofuel mixed with diesel), represents a growing share of the total French rapeseed production. During the 2000/01 marketing year, industrial rapeseed represented 25 percent of rapeseed production and more than half of French rapeseed crush. Consequently, prices paid to producers for industrial rapeseed, which used to be significantly lower than food/feed rapeseed, are getting closer and closer to prices paid for food/feed rapeseed.

Meals

French meal production in CY 1999, CY 2000 and MY 1999/2000 (October/September) was broken down as follows:

	CY 1999	CY 2000	MY 1998/99	MY 1999/00
Sunflower Meal	667,639	743,723	726,021	675,368
Rapeseed Meal	632,278	724,832	584,493	742,983
Soybean Meal	362,745	285,315	371,260	293,434
Peanut Meal	25	42	25	42
Flaxseed Meal	4	3	5	3
TOTAL MEALS	1,662,691	1,753,915	1,681,800	1,711,560

Sunflower meal and rapeseed meal are the major meals produced in France, while the largest domestic demand is for soybean meal. This explains the large imports of soybeans to be crushed and of soybean meal for animal feed consumption.

Consumption**Oilseeds**

The French crushing capacity totals 3.2 million MT seeds per year. The quantities of seeds crushed in CY 1999 and 2000 included the following (in MT of seeds):

	1999	2000
Sunflower Seeds	1,196,785	1,372,889
Rapeseed	1,169,801	1,306,473
Soybeans	451,090	366,915
Peanuts	56	92
Flaxseed	8	9
Others	1,026	1,156
TOTAL	2,818,803	3,047,534

Meals

French meal consumption in CY 1999, CY 2000, MY 1998/99 and 1999/00 (October/September) was as follows (in MT):

	CY 1999	CY 2000	MY 1998/99	MY 1999/00
Soybean Meal	4,271,131	4,442,454	3,304,970	4,421,520
Sunflower Meal	1,051,604	965,513	1,015,610	1,006,820
Rapeseed Meal	970,821	1,035,741	906,055	1,062,250
Peanut Meal	110,459	125,687	131,687	125,246
Flaxseed Meal	115,748	122,909	110,863	122,187
Castor Meal	23,020	19,379	20,525	23,116
Copra Palm Meal	45,474	52,184	46,309	39,213
Cotton Meal	15,585	39,346	18,529	28,259
TOTAL MEALS	6,603,842	6,803,213	6,554,550	6,811,900

Soybean meal is by far the major meal used in France, compared with sunflower and rapeseed meals.

France is the leading European producer of compound feed, with 23.7 million MT in 2000. According to the French feed industry, soybean meal accounts for 17.5 percent of the ingredients used in animal feed, ahead of rape and sun meals (9 percent), and oilseeds (2 percent). The largest share is for grains (46 percent), including mainly wheat and corn.

Trade

While the U.S. was traditionally France's leading supplier of soybeans, Brazil took over this position in MY 98/99, but lost it in MY 99/00. French imports of soybeans increased from 233,175 MT in MY 1998/99 (41 percent market share) to 265,298 MT in MY 1999/00 (57 percent market share).

Brazil strengthened its leading position on the French market for soybean meal in MY 1999/00, with 36 percent market share (3 million MT), ahead of Argentina. The United States remained a minor supplier of soybean meal to France in MY 1999/00, with 8,431 MT shipped.

The ban on meat and bone meals (MBM) from animal feed in late 2000 is an opportunity for U.S. and South American soybeans and soybean meals in France and the EU. France used to incorporate 350,000 MT of MBM into compound feed annually, and these will need to be replaced by 440,000 MT of soybean meal equivalent (5 percent of soybean meal imported by France every year).

Please read reports FR0110, 12/22/00 and FR 1016, 3/9/01 for more detailed information regarding MBM replacement.

Policy

Agenda 2000

Measures taken in Agenda 2000 were implemented for the first time on harvest 2000. Direct subsidies to oilseed growers declined from 94.24 Euros per MT to 81.74 Euros per MT, as a first step to reach 63 Euros per MT for the 2002 harvest. Since the oilseeds acreage in the EU did not exceed the European Maximum Guaranteed Area (MGA) in 1999, no penalty was implemented on oilseed growers payments, even though if France exceeded its national MGA. Direct payments were the following for harvests 1998, 1999, and 2000 (in FF per hectare):

Zone I: Northern France Zone II: Southern France		Rapeseed / Sunflowerseed	Dry Soybean	Irrigated Soybean
1998	Zone I	3,059.53	3,012.30	4,041.98
	Zone II	2,821.30	2,377.30	4,365.52
1999	Zone I	3,655.02	3,598.61	4,894.22
	Zone II	3,370.39	2,840.04	5,286.03
2000	Zone I	3,137.27	3,137.27	3,137.27
	Zone II	2,892.98	2,892.98	2,892.98

Rural Development Regulation: Sunflowerseed Subsidy

Under the Agenda 2000, the EU Commission set a special support program for sunflowerseeds under the rural development regulation. In France, 12,000 producers contracted under this agri-environmental program for harvest 2000. They planted 162,000 ha of sunflowerseeds under this program, i.e., 22 percent of the total acreage for sunflowerseeds. They received an additional support of FF 500 per hectare planted, funded by the EU and the GOF. For the 2001 harvest, the EU Commission tightened the conditions under which growers can receive these payments and many French growers are expected to stop contacting for this program.

Meat and Bone Meal Ban in Animal Feed

On November 14, 2000, the GOF banned meat and bone meals (MBM) from all animal feed. Although MBM has been banned from ruminant feed since 1990, it was still allowed in swine and poultry rations. On December 4, 2000, a similar decision was adopted by the European Council of Agricultural Ministers. French oilseed growers therefore supported an increase in French and EU oilseed and protein seed (such as peas) production to replace MBM with plant proteins in animal feed rations. However, to date, the EU Commission has not proposed any incentive in that direction, due to the Blair House constraints and budget limits set in Agenda 2000.

French Program on non-GMO Soybeans

A growing share of French soybean production is grown under certain strict conditions to produce non-GMO soybean under the brand "Soja de Pays." This non-GMO soybean production increased from 55,000 MT in 1999 to 130,000 MT in 2000. There were 60,000 MT crushed producing 10,000 MT oil and 41,000 MT meals, while 70,000 MT were extruded and used in animal feed. "Soja de Pays" was produced by 5,400 growers and delivered to 76 cooperatives and traders. A minimum FF 100 per MT subsidy is expected to be paid to "Soja de Pays" growers for the 2000 harvest as a premium to the basic soybean aid. In 2001, the expected increase in "Soja de Pays" acreage and production is the main factor leading to the increase in total soybean production.

Standards for producing "Soja de Pays" are based on the traceability of the product: identification of the plots where soybeans are grown, selection of seeds and cultivation monitoring, harvest and transportation to storage facilities, storing, transportation to crushing plants, and processing. Control procedures from an independent firm validate procedures of the various operators; controls are performed on the documents issued at each stage of production; analytical controls are made through PCR analyses; and "conformity barriers" guarantee at several steps of the procedure that products which do not conform to standards are rejected.

European Oilseed Alliance

The European Oilseed Alliance (EOA) was created on April 26 by French oilseed growers (FOP), German oilseed growers (UFOP) and the British oilseed growers (oilseed branch of the NFU). The EOA's objective is to make European Authorities examine the U.S. support system for soybean growers under the Farm Bill. The EOA considers that the U.S. system represents a prejudice for European soybean growers because of the significant decline in soybean and other oilseed prices that it generated. If such a prejudice is recognized by the European authorities, then the EOA would ask for a support system for EU oilseeds similar to the American system.